

# Best Practices in Proactive Customer Service

Proactive customer service is the act of providing contextual customer service at the right time, right place, and the right way, even before the customer asks for it. It can be leveraged in specific customer issues and across customer life stages. Here are five best practices for success.

## 1. Align with business and brand strategy

We group customer contact handling into four types, as shown in Figure 1.

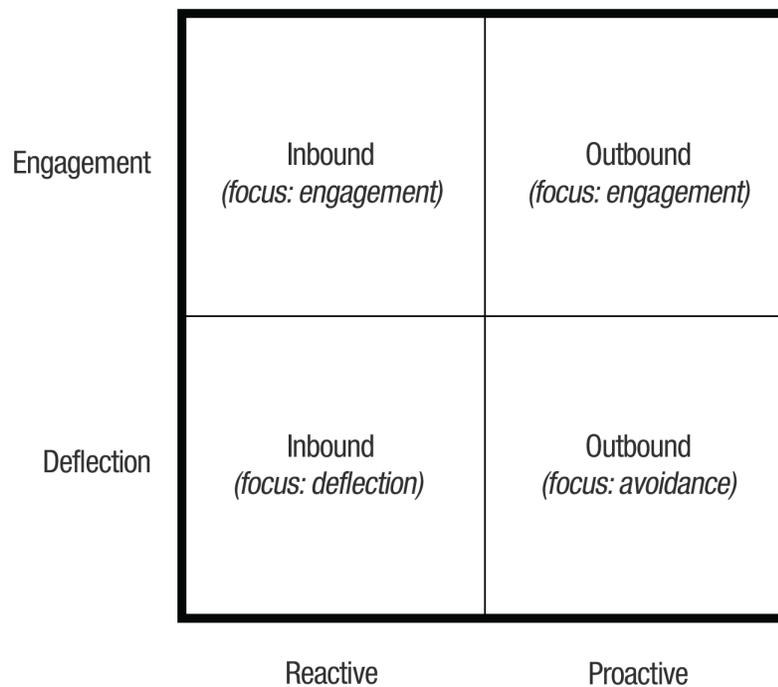


Fig 1: The four ways to handle customer contact

### a) Inbound deflection

- ▶ When a customer is waiting for human assistance (e.g., in an IVR or chat queue), the customer engagement system could send them an SMS with a relevant website link to answers, while retaining their place in the queue. **THIS LINK WILL BE CONTEXTUAL BASED ON THE INTERACTIONS IN THE SESSION.**

### b) Outbound deflection

- ▶ Sometimes called **PREEMPTIVE SERVICE**, this refers to sending useful information preemptively through omnichannel notifications (e.g., over SMS, email, voice) **TO AVOID INBOUND CONTACT THAT WOULD INCREASE CUSTOMER EFFORT.**

### c) Inbound engagement

- ▶ This refers to making proactive, **CONTEXTUAL OFFERS—THEY CAN BE SERVICE OR PROMOTIONAL OFFERS—WHEN A CUSTOMER, WHO INITIATED CONTACT, IS ONLINE.** For example, a website could offer a discount if the shopping cart exceeds a certain value or an option to chat if a person seems stuck on a certain page.

### d) Outbound engagement

- ▶ Here, you send out proactive, contextual **OFFERS THROUGH OUTBOUND NOTIFICATIONS TO CUSTOMERS.** For example, a business may offer a coupon for a product upgrade or a discount for early renewals. Or, send an alert about a product recall with an offer for free repair or replacement or a timely patch to fix bugs in a software product.

Businesses should use the right mix and modes of customer contact, depending on their business strategy, branding strategy, business objectives, and customer context.

Figure 2 shows the tactics that high-touch and low-touch brands might adopt, depending on customer or transaction value. For instance, a low-touch brand can use an automation-heavy, human-blended approach to engage inbound customers of high value whereas a high-touch brand may use the same approach to engage even low-value customers in alignment with its branding strategy. A human-heavy approach will allow easier escalation to human assistance while an automation-heavy approach will make it more difficult to escalate, and human agents may hand off conversations to bots.

Brand Strategy	High-touch	<ul style="list-style-type: none"> <li>Automation - heavy inbound engagement</li> <li>Automated outbound engagement</li> </ul>	<ul style="list-style-type: none"> <li>Human-heavy inbound engagement</li> <li>Automation-heavy outbound engagement</li> </ul>
	Low-touch	<ul style="list-style-type: none"> <li>Automated outbound and inbound deflection</li> </ul>	<ul style="list-style-type: none"> <li>Automation-heavy inbound engagement</li> <li>Automated outbound engagement</li> </ul>
		Low	High
Customer Value			

Fig 2: Customer contact strategies based on brand policy and customer value

## 2. Do it at the right time

You would have seen this as a consumer—the second you go to a website, you will be literally ambushed with an offer of a chat or a feedback survey. This is a major turnoff. A better approach would be to set rules so that the offer is made at the appropriate time—for instance, when a consumer has been on a page for some time or if they have filled up the shopping cart to a certain dollar amount.

## 3. Make the right offer

Proactive service entails making the right offer, based on context. It could be an offer to talk to a chatbot, chat or cobrowse with a human, or escalate to a phone conversation, or information about a useful companion product, a cross-sell promotion, or a tip that will avert a future call (i.e., Next Issue Avoidance).

## 4. Go omnichannel

Though there can be channel-specific offers, proactive customer service should be consistent across touchpoints. Inconsistency of answers leads to customer frustration and inconsistent promotions lead to offer shopping. Go with a

customer engagement solution that unifies knowledge, AI, and analytics across all interaction channels.

## **5. Optimize with analytics**

A/B testing is critical to understanding what offers work and what do not. Make sure your customer engagement solution allows easy A/B testing for each touchpoint and across omnichannel journeys. For example, a retailer may test a free shipping offer against a price discount when the shopping cart is above a certain value. A financial services company could test form completion rates with or without an offer to help fill the forms with cobrowse. In fact, one of our clients saw a 200% increase in form completion rates by offering to cobrowse! A large retail client deflected up to 60% of phone calls with a proactive self-service offer for relevant content.

## **Proactive service with eGain**

eGain has enabled proactive customer service at scale for blue-chip clients with its award-winning solution for omnichannel customer engagement, powered by knowledge, AI, and analytics. The solution offers proactive engagement capabilities such as contextual offers and omnichannel outbound notifications across SMS, messaging channels such as Apple Business Chat, Facebook Messenger, and Twitter DM, and voice. Here are a few client examples:

- ▶ A healthcare giant sends out 500+ million messages per year through SMS, email, and voice to proactively alert consumers about prescriptions, fill status, money saved versus competitors, and other relevant topics.
- ▶ A credit union giant with over 5 million members provides proactive, omnichannel service based on a 360-degree context of members across the contact center, digital channels, and branch offices. The eGain solution enables the service organization to proactively notify members about events such as transaction threshold limits reached and impending credit card expiration. The notifications are based on members' channel preferences and are branded uniformly, while integrating with existing systems for relevant data and events.
- ▶ A leading online retailer makes over 50 million offers and gets 5% uplift in conversion rates with contextual offers, powered by eGain.

## **Final Word**

Implemented with best practices, proactive customer service can create memorable customer experiences, help deflect contact that increases effort for the customer and cost for the service organization, and add transformational value to the business.

## **About eGain**

eGain customer engagement solutions deliver digital transformation for leading brands—powered by virtual assistance, AI, knowledge and analytics. Our comprehensive suite of applications help clients deliver memorable, digital-first customer experiences in an omnichannel world. To find out more about eGain, visit <http://www.egain.com>.